



## FAMILY ADVOCACY TOOLS

# The IEP Advocacy Toolkit

22 worksheets, letters, and reference cards for parents navigating the special education system. Each sheet stands on its own. Print the ones you need, when you need them.

---

### FILL IT IN

Print and write by hand, or type into any line on screen before you print — your answers save on this device.

---

### FILE IT

File completed sheets in your IEP Master Binder. Sheets refer to each other by number — “use Worksheet 3A” means the sheet in this collection.

---

### IN WRITING

Worksheets are filled in, reference cards are read, templates are copied and sent. Everything prints clean in black and white.

---

This collection is parent education, not legal advice. Timelines and procedures vary by state — always check your state’s version. For help with your specific situation, contact your state’s Parent Training & Information Center at [parentcenterhub.org](http://parentcenterhub.org).

# What is here

Every sheet is numbered. Find your situation in the right column and pull the sheet you need.

| PAGE | NO. | SHEET                                          | USE IT WHEN                                |
|------|-----|------------------------------------------------|--------------------------------------------|
| 3    | —   | Plain language glossary                        | A word in the IEP does not make sense      |
| 4    | 1A  | Is my child eligible? Pre-evaluation checklist | Your child is not yet identified           |
| 7    | 1B  | IDEA vs. Section 504                           | You are unsure which law applies           |
| 9    | 1C  | The 13 IDEA disability categories              | Eligibility is being decided               |
| 11   | 1D  | IEP team member directory + escalation ladder  | Setting up, or you need to escalate        |
| 15   | 2A  | FAPE self-assessment                           | Testing whether goals are ambitious enough |
| 18   | 2B  | LRE: the placement continuum                   | Placement is on the agenda                 |
| 20   | 2C  | IEE request letter                             | You disagree with a school evaluation      |
| 22   | 2D  | Education records request letter               | You need the full file                     |
| 24   | 2E  | Procedural safeguards checklist                | Learning your rights, once, properly       |
| 26   | 3A  | IEP document review guide                      | A draft IEP just arrived                   |
| 30   | 3B  | PLAAFP evaluation rubric                       | Judging the present levels                 |
| 32   | 3C  | Annual goal quality checklist                  | One copy per proposed goal                 |
| 34   | 3D  | Accommodations vs. modifications               | Before you agree to any modification       |
| 36   | 4A  | Meeting preparation checklist                  | Three weeks before a meeting               |
| 38   | 4B  | Parent concerns letter                         | Three to five days before a meeting        |
| 41   | 4C  | IEP meeting notes template                     | During the meeting                         |
| 44   | 4D  | Post-meeting follow-up email                   | Within 48 hours after                      |
| 46   | 4F  | Advocate vs. attorney                          | Deciding who to bring                      |
| 48   | 5B  | Escalation letter guide                        | Services are not being delivered           |
| 51   | 5C  | State complaint filing guide                   | Informal resolution has failed             |
| 54   | 5D  | State complaint template                       | You are ready to file                      |
| 57   | 5E  | Legal help directory                           | You need free or low-cost help             |
| 60   | 6B  | School transition checklist                    | A school change is six months out          |
| 62   | 6C  | Secondary transition planning                  | Your child is 14 or older                  |
| 64   | 6D  | Self-advocacy goals                            | Building your child's own voice            |
| 67   | 6E  | Advocacy village directory                     | Building your support network              |

## PLAIN LANGUAGE • TAB 1

## Words the school will use

Keep this sheet in Tab 1 of your binder. You are entitled to ask what any term means, at any point in a meeting. Asking is part of participating.

**IEP** Individualized Education Program. The legal document saying what your child gets, how much, from whom, and where. A contract, not a suggestion.

**IDEA** The federal special education law. Where every right in these sheets comes from.

**FAPE** Free Appropriate Public Education. Free to you, and ambitious enough to make real progress.

**LRE** Least Restrictive Environment. Your child learns alongside nondisabled peers as much as is appropriate for them.

**PLAAFP** Present Levels of Academic Achievement and Functional Performance. Where your child is right now. Every goal must grow out of it.

**Baseline** The number the school starts from. No baseline means no way to prove progress.

**PWN (Prior Written Notice)** The written explanation the school owes you before it changes, or refuses to change, anything. If they say no, ask for it in a PWN.

**IEE** Independent Educational Evaluation. An outside evaluation at the district's expense, when you disagree with theirs.

**Accommodation** Changes HOW your child learns the same material. Does not affect the diploma.

**Modification** Changes WHAT your child is expected to learn. May affect the diploma. Ask before you agree.

**Related services** Speech, occupational therapy, physical therapy, counseling, transportation — the supports that make special education work.

**Case manager** The staff member who coordinates your child's IEP. Your first call, and your most important relationship.

**LEA representative** The person at the table with authority to commit district resources. If they are not there, services cannot be promised.

**Procedural safeguards** The notice listing every right you have. They must give it to you. Most parents never open it. Open it.

**Andrew F.** The 2017 Supreme Court case. Goals must be ambitious in light of your child's circumstances, not merely more than trivial.

**ESY** Extended School Year. Summer services, when a break would cost your child skills they cannot quickly regain.

**FBA / BIP** Functional Behavior Assessment and Behavior Intervention Plan. What the school must do to understand behavior before punishing it.

**Manifestation determination** The meeting required before your child is removed more than 10 days: was the behavior caused by the disability?

**Stay put** Your child stays in the current placement while a due process dispute is pending. The school cannot move them while the dispute is open.

**State complaint** A free written complaint to your state. Investigated in 60 days. No attorney needed. Your most underused tool.

**Mediation / due process** Mediation is a voluntary conversation with a neutral third party. Due process is a legal hearing. Both are your right.

**Compensatory services** Make-up services owed to your child when the school failed to deliver what the IEP promised.

**Transition plan** Required by age 16 in most states. Where your child is going after school, and what the IEP is doing to get them there.

**Age of majority** In most states, IEP rights transfer from you to your child at 18. The IEP must warn you a year ahead.

**PTI and P&A** Parent Training & Information Center and Protection & Advocacy organization. Free help in every state. See Resource 5E.

**SEA** State Education Agency — your state department of education. Where state complaints are filed.

## WORKSHEET 1A

## Is my child eligible? Pre-evaluation checklist

Use this before requesting a special education evaluation. You do not need to check every box. This is a tool to organize your thinking and communicate clearly with the school.

### PART 1 — EDUCATIONAL IMPACT

Check any that describe your child's experience at school.

- ☐ Struggles to keep up with grade-level academic work
- ☐ Has difficulty reading, writing, or doing math at grade level
- ☐ Struggles to communicate or be understood by peers and teachers
- ☐ Has behavioral or emotional challenges that interfere with learning
- ☐ Has difficulty with attention, focus, or organization
- ☐ Is socially isolated or has difficulty with peer relationships
- ☐ Avoids school, complains of anxiety, or has frequent absences
- ☐ Already has a diagnosis from a doctor or private evaluator
- ☐ Receives outside tutoring or therapy but still struggles at school

**PART 2 — SCHOOL HISTORY**

| QUESTION                                                             | YOUR NOTES |
|----------------------------------------------------------------------|------------|
| Has the school expressed concerns about your child?                  |            |
| Has your child received tutoring, support groups, or extra services? |            |
| Has your child ever been held back or had a grade modification?      |            |
| Has the school suggested testing or evaluation before?               |            |
| Does your child have a 504 Plan currently?                           |            |
| Have you shared private reports or diagnoses with the school?        |            |

**PART 3 — YOUR FORMAL REQUEST**

Under IDEA you may request a special education evaluation in writing at any time. The school must respond within a set timeline — typically 15 school days to respond and 60 calendar days to complete the evaluation, though this varies by state.

**Your written request should include:**

|                                                                                               |
|-----------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Your child's full name and date of birth                             |
| <input type="checkbox"/> The specific areas of concern — academic, behavioral, social, speech |
| <input type="checkbox"/> Why you believe a disability may be affecting your child's education |
| <input type="checkbox"/> Any outside evaluations, diagnoses, or reports you hold              |
| <input type="checkbox"/> A request for evaluation in all areas of suspected disability        |
| <input type="checkbox"/> Your contact information and preferred method of communication       |

Submit it in writing. Email with a read receipt is best. Keep a dated copy. The school's clock starts the day they receive your request, not the day they act on it.

### WHAT HAPPENS NEXT

- The school must respond, typically within 15 school days, to accept or decline the request.
- If they agree to evaluate, they will send a consent form. Read it carefully before signing.
- If they decline, they must give you Prior Written Notice explaining why, in writing.
- If you disagree with a refusal, you can file a state complaint or request due process.

### MY NOTES — WHAT I AM SEEING AT HOME AND SCHOOL

Dates, examples, teacher comments, report card notes...

## REFERENCE CARD 1B

## IDEA vs. Section 504, side by side

Both laws protect students with disabilities, but they are different laws with different protections. Knowing which one applies to your child is foundational to effective advocacy.

|                               | IDEA (IEP)                                                    | SECTION 504 (504 PLAN)                                          |
|-------------------------------|---------------------------------------------------------------|-----------------------------------------------------------------|
| <b>What kind of law</b>       | Federal special education law                                 | Federal civil rights law (Rehabilitation Act)                   |
| <b>What it provides</b>       | Specialized instruction and related services                  | Accommodations and access only, with no specialized instruction |
| <b>Eligibility</b>            | One of 13 categories and a need for specialized instruction   | Broader — any impairment limiting a major life activity         |
| <b>The document</b>           | Individualized Education Program                              | 504 Plan                                                        |
| <b>Annual review</b>          | Required at least every 12 months                             | Recommended, not federally required                             |
| <b>Parent consent</b>         | Required for evaluation and initial placement                 | Not required federally; varies by state                         |
| <b>Procedural protections</b> | Extensive — Prior Written Notice, mediation, due process      | Limited — far fewer safeguards for parents                      |
| <b>Who pays</b>               | School district, with some federal funding                    | School district, with no dedicated federal funding              |
| <b>Best for</b>               | Students who need specialized instruction to access education | Students who can access grade-level curriculum with supports    |

### WHICH ONE DOES MY CHILD NEED?

The key question: does my child need **different instruction**, or **better access to the same instruction**?

#### CONSIDER IDEA IF...

- Your child needs to learn differently: different methods, materials, or curriculum
- Your child needs related services: speech, occupational therapy, physical therapy, counseling
- Your child has significant academic gaps their peers do not have
- Your child has already been found eligible under IDEA

#### CONSIDER SECTION 504 IF...

- Your child can learn the same material as peers with the right supports
- The need is mainly time accommodations, physical access, or environmental change
- The disability is managed and primarily needs check-ins and extended time
- Your child exited IDEA but still needs supports

## COMMON MISCONCEPTIONS

| WHAT YOU WILL HEAR                                                   | THE REALITY                                                                                   |
|----------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
| <i>"A 504 is just a weaker IEP."</i>                                 | They serve different purposes. Neither is inherently better. It depends on the child's needs. |
| <i>"My child has a diagnosis, so they get an IEP automatically."</i> | A diagnosis alone does not determine eligibility. The disability must also affect education.  |
| <i>"504 Plans have the same protections as an IEP."</i>              | IDEA has significantly stronger procedural protections for families.                          |
| <i>"The school chooses which one my child gets."</i>                 | You are part of that decision. You can advocate for the level of support your child needs.    |

You can always request a move from a 504 to a full special education evaluation if you believe accommodations alone are not enough.



## REFERENCE CARD 1C

## The 13 IDEA disability categories

IDEA recognizes 13 categories for eligibility. Meeting a category is the starting point, not the end goal. What determines your child's program is the evaluation data, the present levels, and your advocacy.

| CATEGORY                                 | BRIEF DEFINITION                                                                           | NOTES FOR PARENTS                                                             |
|------------------------------------------|--------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------|
| <b>Autism</b>                            | Developmental disability affecting social interaction and communication                    | Broad spectrum; diagnosis and eligibility are separate steps                  |
| <b>Deafblindness</b>                     | Combined hearing and visual impairments causing severe communication and educational needs | Rarest category; specialized programs often needed                            |
| <b>Deafness</b>                          | Hearing impairment so severe that processing language through hearing is impaired          | Differs from Hearing Impairment in degree                                     |
| <b>Developmental Delay</b>               | Delays in physical, cognitive, communication, social, or adaptive development              | Ages 3 to 9 only; not all states use it through age 9                         |
| <b>Emotional Disturbance</b>             | Emotional or behavioral characteristics that adversely affect education                    | Often underidentified; behavior must be more than a response to circumstances |
| <b>Hearing Impairment</b>                | Impairment in hearing, permanent or fluctuating, not covered under Deafness                | In some cases includes auditory processing disorder                           |
| <b>Intellectual Disability</b>           | Significantly below-average intellectual functioning with adaptive behavior deficits       | Terminology updated in 2010                                                   |
| <b>Multiple Disabilities</b>             | Two or more disabilities whose combination creates severe educational needs                | Cannot be served by a program for only one disability                         |
| <b>Orthopedic Impairment</b>             | Severe physical impairment that adversely affects educational performance                  | Includes cerebral palsy, amputations, other physical conditions               |
| <b>Other Health Impairment</b>           | Limited strength, vitality, or alertness from a chronic or acute health problem            | Most common category for ADHD; also epilepsy, sickle cell, diabetes           |
| <b>Specific Learning Disability</b>      | Disorder in the basic processes involved in understanding or using language                | Largest category nationally; includes dyslexia, dyscalculia, dysgraphia       |
| <b>Speech/Language Impairment</b>        | Communication disorder such as stuttering, impaired articulation, or voice impairment      | Second-largest category; often reduced by school age                          |
| <b>Traumatic Brain Injury</b>            | Acquired brain injury from an external force affecting educational performance             | Does not include congenital or degenerative conditions                        |
| <b>Visual Impairment incl. Blindness</b> | Visual impairment, including blindness, that adversely affects educational performance     | Even with correction, if it affects learning, the student may be eligible     |

**Key principle.** The category gets your child in the room. What you do at the table determines what they receive.

**WHAT THE CATEGORY DOES**

- Establishes eligibility for special education services
- Opens the door to an IEP
- Satisfies one of two eligibility criteria under IDEA
- Creates a legal basis for evaluation and reevaluation

**WHAT THE CATEGORY DOES NOT DO**

- Determine the specific services your child receives
- Guarantee any particular level of support
- Define what your child is capable of — that is what strong goals and data do
- Limit the services or goals that can be included in the IEP

## TEMPLATE 1D

# IEP team member directory

Keep this updated and bring it to every meeting. Knowing who to contact, and at what level, is foundational to effective advocacy.

## YOUR CHILD'S SCHOOL TEAM

| ROLE                                | NAME | EMAIL | PHONE |
|-------------------------------------|------|-------|-------|
| Case manager / special ed teacher   |      |       |       |
| General education teacher(s)        |      |       |       |
| Special education director (school) |      |       |       |
| Building principal                  |      |       |       |
| School psychologist                 |      |       |       |
| Speech language pathologist         |      |       |       |
| Occupational therapist              |      |       |       |
| Physical therapist                  |      |       |       |
| School counselor                    |      |       |       |
| Behavior specialist / BCBA          |      |       |       |
| LEA representative                  |      |       |       |
| Paraprofessional / aide             |      |       |       |

## DISTRICT LEVEL

| ROLE                                   | NAME | EMAIL | PHONE |
|----------------------------------------|------|-------|-------|
| District director of special education |      |       |       |
| Assistant superintendent               |      |       |       |
| Superintendent                         |      |       |       |
| School board special ed liaison        |      |       |       |
| District complaint coordinator         |      |       |       |

**YOUR SUPPORT TEAM**

| ROLE                             | NAME / ORGANIZATION | EMAIL | PHONE |
|----------------------------------|---------------------|-------|-------|
| Parent advocate                  |                     |       |       |
| Special education attorney       |                     |       |       |
| Private evaluator / psychologist |                     |       |       |
| Private speech therapist         |                     |       |       |
| Private OT / PT                  |                     |       |       |
| Trusted support person           |                     |       |       |

**STATE & NATIONAL RESOURCES**

| RESOURCE                                  | WHERE TO FIND IT                    | MY NOTES |
|-------------------------------------------|-------------------------------------|----------|
| Parent Training & Information Center      | parentcenterhub.org                 |          |
| Protection & Advocacy organization        | ndrn.org, free legal assistance     |          |
| State Education Agency, special education | Your state department of education  |          |
| COPAA, parent attorneys & advocates       | copaa.org                           |          |
| Wrightslaw                                | wrightslaw.com, free IDEA resources |          |

## TEMPLATE 1D, CONTINUED

## The escalation ladder

When a concern is not resolved at one level, move to the next. Document every step.

**Safety exception.** If your child is in immediate danger, being physically harmed, or facing a serious safety situation at school, skip to step 5 or contact your state's Protection & Advocacy organization. This ladder is for procedural disputes, not safety crises.

| STEP | WHO TO CONTACT                                   | WHEN TO USE THIS LEVEL                                                                 |
|------|--------------------------------------------------|----------------------------------------------------------------------------------------|
| 1    | Classroom teacher / service provider             | Day-to-day implementation, communication, or specific lessons                          |
| 2    | Case manager                                     | Goal progress, service delivery, IEP implementation, coordination of supports          |
| 3    | School special education coordinator or director | A pattern of concerns the case manager has not resolved; IEP team issues               |
| 4    | Building principal                               | School-level accountability, culture concerns, repeated nonimplementation              |
| 5    | District director of special education           | School-level resolution not achieved; formal written complaints; patterns across staff |
| 6    | State education agency — state complaint         | IDEA violations not resolved internally; denial of FAPE; procedural violations         |

Exhausting school-level options first preserves working relationships and is associated with faster resolution of procedural concerns.

LOG EVERY ESCALATION

| DATE | STEP | WHAT I RAISED | RESPONSE | NEXT STEP BY |
|------|------|---------------|----------|--------------|
|      |      |               |          |              |
|      |      |               |          |              |
|      |      |               |          |              |
|      |      |               |          |              |

## WORKSHEET 2A

## FAPE self-assessment: is my child's IEP ambitious enough?

Use this to test the current IEP against the Endrew F. standard, which requires that goals be “reasonably calculated to enable a child to make progress appropriate in light of the child’s circumstances.”

### PART 1 — REVIEW LAST YEAR'S GOALS

| GOAL (SUMMARIZE BRIEFLY) | MET? | % ACHIEVED | YOUR OBSERVATIONS |
|--------------------------|------|------------|-------------------|
|                          |      |            |                   |
|                          |      |            |                   |
|                          |      |            |                   |
|                          |      |            |                   |
|                          |      |            |                   |

Did meeting these goals produce meaningful progress, or did your child tread water?

**PART 2 — EVALUATE THIS YEAR'S DRAFT GOALS**

A measurable goal answers: WHO does WHAT, under WHAT CONDITIONS, to WHAT DEGREE, BY WHEN, measured HOW. Mark Y/N in each column.

| GOAL AREA             | BASELINE? | MEASURABLE? | AMBITIOUS? | QUESTION I WILL RAISE |
|-----------------------|-----------|-------------|------------|-----------------------|
| Reading / literacy    | _____     | _____       | _____      | _____                 |
| Mathematics           | _____     | _____       | _____      | _____                 |
| Writing               | _____     | _____       | _____      | _____                 |
| Speech / language     | _____     | _____       | _____      | _____                 |
| Social / emotional    | _____     | _____       | _____      | _____                 |
| Functional / adaptive | _____     | _____       | _____      | _____                 |

**PART 3 — THE ENDREW F. TEST**

- ☐ If my child achieves every goal on this IEP, will there be a meaningful, documented gap closure?
- ☐ Is the target based on actual assessment data, or on what is easy to achieve?
- ☐ Would an outside evaluator call this goal ambitious given my child's potential?
- ☐ If my child hits this goal by December, was it set too low for a June deadline?
- ☐ Are goals connected to grade-level standards in some way, even if modified?



PART 4 — MY ADVOCACY PRIORITIES

| PRIORITY                         | THE EXACT WORDS I WILL USE |
|----------------------------------|----------------------------|
| Goal I want strengthened         |                            |
| Data I am requesting             |                            |
| Service I want increased         |                            |
| Concern I want in writing        |                            |
| My firm requirement for this IEP |                            |

## REFERENCE CARD 2B

## LRE: the placement continuum explained

Least Restrictive Environment requires that children with disabilities be educated alongside nondisabled peers to the maximum extent appropriate. Placement must be individualized — not driven by budget, staffing, or which program has an open seat.

### LEAST RESTRICTIVE TO MOST RESTRICTIVE

| # | PLACEMENT SETTING                                  | WHAT THIS MEANS IN PRACTICE                                                                                                      |
|---|----------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|
| 1 | Full inclusion in general education                | All instruction alongside nondisabled peers with in-class supports, accommodations, and team teaching                            |
| 2 | Inclusion with pullout for specialized instruction | In general education most of the day; leaves for small-group specialized instruction in specific skill areas                     |
| 3 | Resource room, significant pullout                 | A substantial portion of academics in a special education setting; general education for other subjects, specials, lunch, recess |
| 4 | Self-contained class in a general education school | Most academics in a separate special education class; may join general education for nonacademic activities                      |
| 5 | Separate special education school                  | A school specifically for students with disabilities, apart from the general education population                                |
| 6 | Residential program                                | Student lives and is educated in a residential facility; used when the disability requires 24-hour educational support           |
| 7 | Homebound / hospital instruction                   | Instruction at home or in hospital for medical or disability-related necessity; the most restrictive setting                     |

**Order matters.** Placement is determined AFTER goals and services. If the team is discussing placement before the goals are written, the process has been reversed — say so.

#### THE SCHOOL MUST...

- Document in writing why the proposed placement is appropriate
- Justify in writing why a less restrictive setting with supports is not appropriate
- Include your child in nonacademic activities with nondisabled peers to the maximum extent appropriate
- Consider a full range of supplementary aids and services before recommending a more restrictive setting
- Review placement at least annually

#### THE SCHOOL CANNOT...

- Place your child based on available slots or programs
- Determine placement before completing the IEP
- Remove your child from general education without documenting why supports there were insufficient
- Use the disability category alone to determine placement
- Use a more restrictive setting as discipline without a proper manifestation determination

**QUESTIONS TO ASK ABOUT PLACEMENT**

- What specific data supports the proposed placement for my child?
- What supplementary aids and services were considered in the general education setting first?
- How was it determined that supports in a less restrictive setting are not sufficient?
- Can the team show documentation of which supports were tried in a less restrictive setting, and why they were insufficient?
- Where will my child receive lunch, recess, specials, and extracurriculars?
- Is this placement reviewed annually, and can it change as my child progresses?
- Has the team considered the benefit to my child of being educated with nondisabled peers?

LRE does not mean forced inclusion. If your child needs a more supported setting to receive an appropriate education, you can advocate for that too. The goal is the **MOST APPROPRIATE** setting — never the least restrictive one at the cost of an appropriate education.

## TEMPLATE 2C

## Independent Educational Evaluation request letter

Fill in the bracketed fields. Send by email with a read receipt, or by certified mail, so you have proof of the date received. Keep a dated copy.

[Your name] · [Your address] · [City, State, ZIP] · [Your email] · [Your phone]

[Date]

[Principal or Special Education Director name] · [School name] · [School address]

### Re: Request for Independent Educational Evaluation at public expense

Dear [Name]:

I am writing to formally request an Independent Educational Evaluation (IEE) for my child, [Child's full name], date of birth [DOB], currently enrolled in [grade] at [school name].

I disagree with the [describe the evaluation, e.g. "psychoeducational evaluation completed on (date)"] conducted by the district. Specifically, I have concerns regarding [e.g. "the completeness of the cognitive assessment," "the failure to assess all areas of suspected disability," "the conclusions drawn from the data"].

Under the Individuals with Disabilities Education Act, 34 C.F.R. § 300.502, I have the right to obtain an IEE at public expense if I disagree with an evaluation obtained by the public agency. I am exercising that right and requesting that the district fund an independent evaluation in the following area(s): [area, e.g. psychoeducational / cognitive assessment]; [area, e.g. speech language evaluation]; [area, e.g. occupational therapy evaluation].

I understand that upon receipt of this request the district must either (1) initiate a due process hearing to demonstrate that its evaluation is appropriate, or (2) provide funding for the independent evaluation without delay.

Please provide me with your agency criteria for IEEs, including the geographic area and the qualifications required of evaluators, within [5 business days / your state's required timeline].

I am available to discuss this further at your convenience. Please respond in writing to the email or address above.

Sincerely,

[Your signature] · [Your printed name] · Parent/Guardian of [Child's name]

**DRAFT MY SPECIFICS BEFORE I COPY THE LETTER**

The evaluation I disagree with, and its date

---

My specific concerns with it

---

Area(s) I am requesting

---

Date sent / how sent

---

**WHAT HAPPENS NEXT**

- The district must respond promptly. They cannot delay indefinitely.
- If they agree to fund it, they send their evaluator criteria and you choose from qualified evaluators in the area.
- If they file for due process, they must prove their evaluation was appropriate — and you still get a hearing.
- Once complete, the IEE must be considered by the IEP team. It does not have to be accepted, but it must be reviewed.

This template is parent education, not legal advice. Consider consulting a special education advocate or attorney about your specific situation.

## TEMPLATE 2D

## Education records request letter

Use this to formally request your child's educational records. Under FERPA the school must comply within 45 days. Send by email with a read receipt or by certified mail.

[Your name] · [Address] · [City, State, ZIP] · [Email] · [Phone]

[Date]

[Records custodian / Principal / Special Education Director] · [School name] · [School address]

**Re: Formal request for educational records — [Child's full name]**

Dear Records Custodian:

Pursuant to the Family Educational Rights and Privacy Act (FERPA), 20 U.S.C. § 1232g, and the Individuals with Disabilities Education Act, I am formally requesting copies of all educational records for my child: [child's full name], date of birth [DOB], currently in [grade] at [school], student ID [if known].

I am requesting all records related to my child's education, including but not limited to:

- All current and past IEPs, every version, with dates
- All evaluations and assessments, conducted by the school and any district-funded IEEs
- Progress reports on IEP goals, all reporting periods
- All Prior Written Notices issued
- All procedural safeguards notices provided
- Discipline records, including any manifestation determination reviews
- Attendance records, report cards, and academic records
- Any correspondence — emails, letters, notes — regarding my child in the school's files
- Meeting notes or summaries from any IEP, eligibility, or team meeting
- Any third-party reports the school has received and placed in my child's file
- Raw test data, scoring protocols, and evaluator worksheets from all assessments — these are often withheld unless specifically requested
- Internal evaluator notes, draft reports, and working documents related to any evaluation of my child
- All email communications between school staff regarding my child, including internal emails not addressed to me — these are education records under FERPA and must be provided upon request

Please provide these records in electronic format (PDF preferred) or notify me of any copying fees before mailing paper copies. I understand that under FERPA my request must be fulfilled within 45 days.

If any records are withheld, please provide a written explanation specifying the legal basis for withholding each record.

Thank you for your prompt attention to this request.

Sincerely,

[Signature] · [Printed name] · Parent/Guardian of [Child's name]

**When the records arrive.** Review them within two weeks and note anything that appears missing, inaccurate, or concerning. You have the right to request corrections to inaccurate information — and a gap in the file is itself information.

#### WHAT I NOTICED IN THE RECORDS — MISSING, INACCURATE, OR CONCERNING

## CHECKLIST 2E

## Procedural safeguards: the nine sections to find

The Procedural Safeguards Notice contains every right you have under IDEA in one document. Most parents never read it. That is a mistake. Your state's version may run 20 to 40 pages and use different headings — you do not need to memorize it, only to know where each section is. Write the page numbers down once.

### WHEN YOU SHOULD RECEIVE THIS DOCUMENT

- Upon initial referral for a special education evaluation
- At each annual IEP meeting
- Upon each reevaluation
- When a due process complaint is filed
- When a disciplinary action constitutes a change of placement
- Upon request, at any time

### FIND AND MARK EACH SECTION

| SECTION                                    | WHAT TO LOOK FOR                                                                                                                                                                     | MY PAGE |
|--------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|
| <b>Prior Written Notice</b>                | When and how the school must notify you in writing before changing identification, evaluation, placement, or FAPE. What the notice must include, and how to respond if you disagree. | _____   |
| <b>Parental consent</b>                    | When the school must obtain your written consent, when you can revoke it, and what happens if you decline consent for initial evaluation or initial services.                        | _____   |
| <b>Independent Educational Evaluation</b>  | Your right to an outside evaluation at public expense when you disagree with the school's evaluation. The process, your rights, and what happens next.                               | _____   |
| <b>Access to education records</b>         | Your right to inspect and review all records, timelines for compliance, how to request corrections, confidentiality protections.                                                     | _____   |
| <b>Mediation</b>                           | How mediation works, who pays for it, what happens to agreements, and the voluntary nature of the process.                                                                           | _____   |
| <b>Due process complaints and hearings</b> | How to file, timelines, what happens at a hearing, the resolution process, attorney's fees, the two-year statute of limitations.                                                     | _____   |
| <b>State complaints</b>                    | How to file with the State Education Agency, the 60-day resolution timeline, what happens if a violation is found.                                                                   | _____   |
| <b>Stay put / pendency</b>                 | Your child's right to remain in their current placement while a due process proceeding is pending. When this protection applies.                                                     | _____   |
| <b>Discipline / change of placement</b>    | What schools can and cannot do when disciplining a student with an IEP. The manifestation determination process. The 10-day rule. Services during suspension.                        | _____   |



**WHERE TO FIND YOUR STATE'S DOCUMENT**

- Ask the school for a copy at your next IEP meeting. They are required to provide it.
- Search “[your state] Department of Education Procedural Safeguards Notice” to download the current version.
- Keep it in Tab 1 of your IEP Master Binder, with your page numbers written on this sheet.

## WORKSHEET 3A

# IEP document review guide

Review your child's IEP before the meeting — never for the first time at the table. Work through each section below and mark concerns so you arrive with a list, not a feeling.

## 1 — COVER PAGE & BASIC INFORMATION

| QUESTION                                                   | OK?                      | NOTES / CONCERN |
|------------------------------------------------------------|--------------------------|-----------------|
| Are the dates correct — start, end, annual review?         | <input type="checkbox"/> |                 |
| Is the disability category listed, and does it seem right? | <input type="checkbox"/> |                 |
| Has this IEP expired? Check the annual review date.        | <input type="checkbox"/> |                 |
| Are all required team members listed?                      | <input type="checkbox"/> |                 |

**2 — PRESENT LEVELS (PLAAFP)**

| QUESTION                                                                     | OK?                      | NOTES / CONCERN |
|------------------------------------------------------------------------------|--------------------------|-----------------|
| Are there specific data points and scores, not just impressions?             | <input type="checkbox"/> |                 |
| Is there a clear baseline for each area of need?                             | <input type="checkbox"/> |                 |
| Is there an impact statement — how the disability affects curriculum access? | <input type="checkbox"/> |                 |
| Are my child's strengths represented, not only deficits?                     | <input type="checkbox"/> |                 |
| Is parent input included and represented accurately?                         | <input type="checkbox"/> |                 |
| Is functional performance included, not just academics?                      | <input type="checkbox"/> |                 |
| Compared to last year, does the PLAAFP show documented growth?               | <input type="checkbox"/> |                 |

**3 — ANNUAL GOALS**

| QUESTION                                                            | OK?                      | NOTES / CONCERN |
|---------------------------------------------------------------------|--------------------------|-----------------|
| Is each goal measurable — who, what, conditions, degree, when, how? | <input type="checkbox"/> |                 |
| Does each goal connect to a specific baseline in the PLAAFP?        | <input type="checkbox"/> |                 |
| Are goals appropriately ambitious under Endrew F., not merely safe? | <input type="checkbox"/> |                 |
| Is there a goal for each area of educational need?                  | <input type="checkbox"/> |                 |
| How will progress be measured, and how often reported?              | <input type="checkbox"/> |                 |

## 4 — SERVICES

| QUESTION                                                                                  | OK?                      | NOTES / CONCERN |
|-------------------------------------------------------------------------------------------|--------------------------|-----------------|
| Does every service list what, by whom, frequency, setting, and start date?                | <input type="checkbox"/> |                 |
| Is the frequency sufficient for meaningful progress?                                      | <input type="checkbox"/> |                 |
| Are services connected to goals? Are there any orphan goals?                              | <input type="checkbox"/> |                 |
| <b>Red flag:</b> any “consultation only” services — the specialist never sees your child? | <input type="checkbox"/> |                 |
| <b>Red flag:</b> any “as needed” language — not specific, not enforceable?                | <input type="checkbox"/> |                 |

## 5 — ACCOMMODATIONS &amp; PLACEMENT

| QUESTION                                                                         | OK?                      | NOTES / CONCERN |
|----------------------------------------------------------------------------------|--------------------------|-----------------|
| Are accommodations specific and actionable?                                      | <input type="checkbox"/> |                 |
| Any modifications? If so, has the diploma track impact been explained?           | <input type="checkbox"/> |                 |
| Are accommodations also listed for state and district assessments?               | <input type="checkbox"/> |                 |
| Is placement in the LRE? Is time outside general education justified in writing? | <input type="checkbox"/> |                 |
| Was placement determined AFTER goals and services, not before?                   | <input type="checkbox"/> |                 |
| If your child is 16 or older: is a transition plan included?                     | <input type="checkbox"/> |                 |

**MY TOP CONCERNS TO RAISE AT THE MEETING**

Number them in priority order. Know which ones you will not leave without.

- 1.
- 2.
- 3.

## WORKSHEET 3B

# PLAAFP evaluation rubric

The PLAAFP is the foundation of the entire IEP. If it is weak, everything built on it is weak. Score each dimension: 3 = strong, 2 = adequate, 1 = weak.

| SCORE<br>3/2/1 | DIMENSION — WHAT STRONG LOOKS LIKE                                                                    | MY NOTE |
|----------------|-------------------------------------------------------------------------------------------------------|---------|
| _____          | <b>Specific data</b> — includes assessment scores, grade-level equivalents, curriculum-based measures | _____   |
| _____          | <b>Clear baseline</b> — establishes a starting point that goals can build from                        | _____   |
| _____          | <b>Educational impact</b> — explicitly explains HOW the disability affects curriculum access          | _____   |
| _____          | <b>Strengths documented</b> — includes what the child CAN do, not just deficits                       | _____   |
| _____          | <b>Parent input included</b> — specifically captured, not merely acknowledged                         | _____   |
| _____          | <b>Functional performance</b> — addresses daily living, social, and behavioral areas where relevant   | _____   |
| _____          | <b>Growth documented</b> — compared to the prior year, shows progress or documents regression         | _____   |
| _____          | <b>Connected to goals</b> — each area of need leads to a measurable goal                              | _____   |
| _____          | <b>PLAAFP-to-goal connection</b> — the baseline is restated in the goal itself                        | _____   |

**On the ninth dimension.** Explicit linkage between PLAAFP baseline data and goal language is the standard state compliance reviewers now use. Strong reads: “Because [student] currently reads at X level, the annual goal is that [student] will read at Y level by [date].” The absence of that link is among the most frequently cited IEP compliance deficiencies.

**AREA-BY-AREA REVIEW**

For each area of need, mark Y/N: specific data, an impact statement, a clear baseline, and an explicit goal connection.

| AREA OF NEED                         | DATA? | IMPACT? | BASELINE? | GOAL LINK? | MY RATING 1-3 |
|--------------------------------------|-------|---------|-----------|------------|---------------|
| Reading / literacy                   |       |         |           |            |               |
| Mathematics                          |       |         |           |            |               |
| Written expression                   |       |         |           |            |               |
| Speech / language                    |       |         |           |            |               |
| Social / emotional / behavioral      |       |         |           |            |               |
| Adaptive / functional / daily living |       |         |           |            |               |

**OVERALL ASSESSMENT**

|                                    |  |
|------------------------------------|--|
| Total score (out of 27)            |  |
| Biggest gap in the PLAAFP          |  |
| Data I will request at the meeting |  |
| Language I want added or changed   |  |

If the PLAAFP is vague, say so. Ask: “What data supports this statement?” and “How does this connect to the proposed goal?”

## WORKSHEET 3C • ONE COPY PER GOAL

# Annual goal quality checklist

Use one copy of this sheet per goal. A strong goal earns a check on every item. Goals that fail multiple criteria should be challenged.

**GOAL AREA** \_\_\_\_\_

**FULL GOAL TEXT, COPIED EXACTLY AS WRITTEN**

## PART 1 — SMART COMPONENTS

| ✓                        | COMPONENT                                   | WHAT TO LOOK FOR                                                              |
|--------------------------|---------------------------------------------|-------------------------------------------------------------------------------|
| <input type="checkbox"/> | <b>Specific — names the student</b>         | "[Student name] will..." identifies the specific child and the specific skill |
| <input type="checkbox"/> | <b>Measurable — quantifiable target</b>     | Includes a number, percentage, frequency, or rate — not "will improve"        |
| <input type="checkbox"/> | <b>Conditions — context stated</b>          | "Given a graphic organizer," "with a verbal prompt," "independently"          |
| <input type="checkbox"/> | <b>Achievable — realistic but ambitious</b> | Based on the child's baseline — not too easy, not impossible                  |
| <input type="checkbox"/> | <b>Relevant — connected to a real need</b>  | Directly addresses an area in the PLAAFP, not a generic addition              |
| <input type="checkbox"/> | <b>Time-bound — has an end date</b>         | "By the end of the IEP period" or a specific date                             |
| <input type="checkbox"/> | <b>Method — states how it is measured</b>   | "As measured by weekly probes," "teacher observation," "rubric scoring"       |

## PART 2 — ENDREW F. AMBITION TEST

- ☐ Is this goal more than trivial progress? Could a reasonable person call it ambitious?
- ☐ If my child meets this goal by December, was it set too low for a June deadline?
- ☐ Is this goal calibrated to my child's potential, not to what is easy to document?
- ☐ If my child meets every goal this year, will there be documented gap closure?



☐ Is the target derived from assessment data, not from administrative convenience?

**PART 3 — RED FLAGS. IF YOU CHECK ANY BOX BELOW, CHALLENGE THE GOAL.**

☐ Goal uses vague language: “will improve,” “will increase,” “will demonstrate progress”

☐ Goal has no baseline — no starting point is stated in the PLAAFP

☐ Goal is identical or nearly identical to last year’s goal

☐ Goal has no stated measurement method

☐ Goal is in an area where my child has no corresponding service

☐ Goal seems designed to be easy to “meet” rather than to create real progress

**MY NOTES AND QUESTIONS FOR THIS GOAL**

## REFERENCE CARD 3D

## Accommodations vs. modifications

One of the most important distinctions in special education, and one of the most misunderstood. Getting it wrong can have long-term consequences for your child's diploma track and postsecondary options.

### ACCOMMODATIONS

- Change HOW the student accesses instruction
- Student works toward the SAME grade-level standards as peers
- The standard does not change, only the delivery or format
- Does NOT affect standard diploma eligibility

### MODIFICATIONS

- Change WHAT the student is expected to learn
- Student is held to a DIFFERENT academic standard than peers
- The content, complexity, or volume of what is learned changes
- MAY affect standard diploma eligibility. Ask your district

### COMMON EXAMPLES

| SUBJECT                         | ACCOMMODATION EXAMPLES                                                                           | MODIFICATION EXAMPLES                                                                                                        |
|---------------------------------|--------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------|
| <b>Reading</b>                  | Audiobooks or text-to-speech; extended time; highlighted text; preferential seating              | Shortened passages; simplified vocabulary or lower-Lexile texts; fewer comprehension questions                               |
| <b>Mathematics</b>              | Calculator; multiplication chart; extended time; graph paper; problems read aloud                | Fewer problems assigned; alternate curriculum (3rd-grade math instead of 5th); removing multistep problems                   |
| <b>Written expression</b>       | Voice-to-text; graphic organizer; extended time; spell check; keyboarding instead of handwriting | Shorter required length; bullet points instead of essay; fewer paragraphs                                                    |
| <b>Science / social studies</b> | Notes provided in advance; tests read aloud; extended time; oral instead of written response     | Alternate learning objectives; simplified content; reduced scope of standards covered                                        |
| <b>Tests</b>                    | Extended time; separate room; frequent breaks; test read aloud; large print                      | Alternate assessment (portfolio vs. standardized); a different test measuring different standards; modified passing criteria |

**Diploma track warning.** In most states, modifications to grade-level standards can affect eligibility for a standard high school diploma. This is one of the most consequential decisions in an IEP. Ask explicitly before agreeing to modifications.

## WATCH FOR MODIFICATION CREEP

Modification creep is the gradual, unnoticed shift from accommodation to modification over time, often without any formal IEP team decision. It is the most common pattern causing unintended diploma-track consequences, and it usually goes undetected by families until high school.

### HOW IT HAPPENS

- A teacher informally shortens assignments or simplifies tests without an IEP team decision
- An accommodation like extended time is gradually paired with a reduced standard — fewer problems required — without documentation
- A student is moved to a lower-level course that does not meet grade-level standards without a formal placement discussion
- Progress is measured against modified standards in progress reports, so the gap to grade level grows invisibly

### WHAT TO DO

- At every annual review, ask: “Is my child being measured against the same academic standards as their peers in every subject?”
- Ask teachers to confirm in writing which standard each assignment and assessment is measuring
- If a modification is intentional and appropriate, make sure it is formally written into the IEP with the diploma-track implications documented

## QUESTIONS TO ASK BEFORE AGREEING TO MODIFICATIONS

- Will these modifications affect my child’s ability to earn a standard high school diploma?
- What diploma track is my child on, and how do these modifications affect that?
- Are there accommodations we have not tried that might address the same need without modifying the standard?
- If we modify the curriculum now, what is the plan to close the gap and return to grade-level standards?
- At this annual review, which graduation credential is my child currently on track to receive — a standard diploma, a modified diploma, a certificate of completion, or something else?
- If my child is receiving modifications, has the team formally documented that decision and its diploma-track implications in the IEP?
- Are there any informal modifications happening in classrooms that are not written into the IEP?

## GREY AREAS — WHEN IT IS NOT CLEAR

When in doubt, ask: is my child expected to master the same content and demonstrate the same level of learning as peers, just in a different way? Or is the standard itself being reduced?

| THE SUPPORT                             | WHEN IT IS AN ACCOMMODATION                                    | WHEN IT BECOMES A MODIFICATION                                          |
|-----------------------------------------|----------------------------------------------------------------|-------------------------------------------------------------------------|
| <b>Reduced assignment length</b>        | Same content, fewer problems to demonstrate mastery (10 of 20) | Different content, lower-level problems or skills than peers            |
| <b>Oral instead of written response</b> | Same content, different format to express mastery              | Different content, less complex analysis required because of the format |
| <b>Simplified texts</b>                 | Same skills practiced, different reading level for practice    | Different standards — not expected to ever access grade-level text      |

## WORKSHEET 4A

# IEP meeting preparation checklist

The school team has been preparing for this meeting for weeks. You should too. Start three weeks out and work down.

## THREE WEEKS BEFORE

- ☐ Request the draft IEP, all evaluation reports, and progress data on last year's goals, in writing
- ☐ Ask for meeting documents at least 5 business days before the meeting date
- ☐ Pull out last year's IEP and review which goals were met, partially met, or not met
- ☐ Note whether last year's services were actually delivered as written
- ☐ Decide whether to bring an advocate, private evaluator, or support person (see Guide 4F)
- ☐ Notify the school in writing if you plan to bring an outside person
- ☐ Read up on the Endrew F. standard and your state's IDEA implementation

## TWO WEEKS BEFORE

- ☐ Review the draft IEP using Worksheet 3A, the IEP Document Review Guide
- ☐ Evaluate each proposed goal using Worksheet 3C, the Goal Quality Checklist
- ☐ Evaluate the present levels using Worksheet 3B, the PLAAFP Rubric
- ☐ Note all concerns, questions, and priorities
- ☐ Draft your Parent Concerns Letter (Template 4B) — what is working, what is not, your priorities
- ☐ Write out 5 to 10 specific questions to ask at the meeting

## ONE WEEK BEFORE

- ☐ Submit your Parent Concerns Letter to the school by email with a read receipt
- ☐ Confirm the meeting date, time, and location in writing
- ☐ Confirm who will attend — are all required team members included?
- ☐ Prepare your binder: current IEP, last year's IEP, evaluations, progress reports, your concerns letter
- ☐ Print your written questions

- ☐ If bringing a support person, brief them on your child's needs and your priorities

**THE NIGHT BEFORE**

- ☐ Review your top three to five priorities — know what you will not leave without
- ☐ Pack your binder, something to write with, and your written questions
- ☐ Prepare to record if your state law permits — check first, some states require consent
- ☐ Remind yourself: you are a required member of this team, not a guest

**DAY OF THE MEETING**

- ☐ Arrive a few minutes early and greet team members by name
- ☐ Confirm everyone required is present before starting
- ☐ Ask that your concerns letter be formally acknowledged as part of the record
- ☐ Take notes throughout — WHO said WHAT, not just decisions (use Template 4C)
- ☐ Note anything discussed but not written into the IEP
- ☐ If you feel rushed: "I would like to slow down. This is important to my child."
- ☐ You do NOT have to sign at the meeting — take the document home to review

**WITHIN 48 HOURS AFTER**

- ☐ Send a follow-up email summarizing what was agreed to. Use Template 4D
- ☐ Note anything discussed verbally but not written into the IEP, and ask to add it
- ☐ Set reminders: 6-week check-in, and each report card period when progress reports are issued
- ☐ If you signed: confirm the implementation start date for every service
- ☐ If you did not sign: submit written objections or requests for revision within your state's timeline

## TEMPLATE 4B

## Parent concerns letter

Submit this letter three to five days before the IEP meeting. It creates an official record of your priorities and ensures your voice is present even if the meeting is rushed. Keep it to one or two pages. Draft each section in the boxes, then copy into your letter.

[Your name] · [Address] · [Email] · [Phone] · [Date]

[Case manager / Special Education Director / Principal] · [School name]

**Re: Parent/Guardian input and concerns — IEP meeting for [Child's name], [date of meeting]**

Dear [Name]:

I am writing to submit my input and concerns in advance of my child's IEP meeting scheduled for [date]. I am grateful for the opportunity to collaborate with the team and want to ensure my perspective is part of the record.

[Your four sections go here — draft them below.]

I look forward to a productive meeting. Please acknowledge receipt of this letter and ensure it is included in the meeting record.

Sincerely,

[Signature] · [Printed name] · Parent/Guardian of [Child's name]

### WHAT IS WORKING

What you have observed going well — teacher relationships, progress in specific areas, supports that have helped. Be genuine; specifics carry more weight than generalities.

**MY CONCERNS**

Clear and factual, referencing the IEP or evaluations where possible. E.g. “I am concerned that the proposed reading goal does not reflect my child’s capacity, given that...” · “My child receives 30 minutes of speech therapy per week and I believe this is insufficient because...”

**MY PRIORITIES FOR THIS MEETING**

Two to four specific things you want addressed. Be direct. This becomes part of the record.

- 1.
- 2.
- 3.

**MY VISION FOR MY CHILD**

Your long-term hopes and what a successful school year looks like. Ground the team in what you are working toward together.

SPECIFIC QUESTIONS I WILL RAISE

| MY QUESTION | TOPIC AREA |
|-------------|------------|
|             |            |
|             |            |
|             |            |
|             |            |
|             |            |
|             |            |

**Get it in the document.** Under IDEA your written concerns must be included in the IEP if you request it. If your concerns are acknowledged but not documented, say at the meeting: “I would like my concerns added to the IEP record.”



## TEMPLATE 4C

# IEP meeting notes

Use this during the meeting. Your notes are your record. Write WHO said WHAT, not just decisions. Date and time everything.

## MEETING DETAILS

Date & time

Location

Meeting type

People present

People NOT present (required)

## PROGRESS ON LAST YEAR'S GOALS

| GOAL AREA | % MET | DATA SHARED / MY NOTES |
|-----------|-------|------------------------|
|           |       |                        |
|           |       |                        |
|           |       |                        |
|           |       |                        |
|           |       |                        |

PROPOSED GOALS — THIS YEAR

| GOAL AREA / SUMMARY | MY RATING 1-3 | QUESTIONS I RAISED / RESPONSES |
|---------------------|---------------|--------------------------------|
|                     |               |                                |
|                     |               |                                |
|                     |               |                                |
|                     |               |                                |
|                     |               |                                |

SERVICES DISCUSSED

| SERVICE | FREQ / MIN | SETTING | NOTES / CONCERNS |
|---------|------------|---------|------------------|
|         |            |         |                  |
|         |            |         |                  |
|         |            |         |                  |
|         |            |         |                  |

VERBAL COMMITMENTS NOT YET IN THE IEP

If it is not in writing, it does not exist. Everything in this table goes into your follow-up email within 48 hours (Template 4D).

| WHO SAID IT | WHAT WAS PROMISED | FOLLOW UP NEEDED BY |
|-------------|-------------------|---------------------|
|             |                   |                     |
|             |                   |                     |
|             |                   |                     |

TOPICS NOT ADDRESSED

Anything skipped, rushed, or tabled. Reference this in your follow-up email.

DID I SIGN?

Did I sign the IEP? (yes / no)

What exactly I signed

Documents I took home

Next meeting or follow-up date

You do not have to sign at the meeting. You may take the document home, read it, and sign it later.

## TEMPLATE 4D

## Post-meeting follow-up email

Send this within 24 to 48 hours of any IEP meeting. It creates a written record of agreements, verbal commitments, and unresolved items. If the school disagrees with your summary and says nothing, their silence becomes acceptance.

**To** [Case manager email] + [Special Education Director email]

**CC** [Principal email] + your own email, so you have a copy

**Subject** IEP Meeting Follow-Up — [Child's name], [date of meeting]

Dear [Team],

Thank you for meeting with me on [date] to discuss [Child's name]'s IEP. I am writing to confirm my understanding of what was discussed and agreed upon. Please let me know within [5 business days] if I have misrepresented anything.

### What was agreed to

[List each agreement specifically. Be precise about services, frequencies, and timelines. E.g. "[Child] will receive 60 minutes per week of specialized reading instruction in a small-group setting, beginning [start date]."]

### Verbal commitments not yet in writing

[Document anything said verbally but not written into the IEP. E.g. "[Name] stated that [Child] would receive weekly check-ins from the school counselor — I am requesting this be added to the IEP."]

### Items not addressed or tabled

[List anything not discussed or postponed. This creates accountability. E.g. "We did not discuss Extended School Year eligibility — I am requesting a written response by [date]."]

### My outstanding questions

[Include any questions that were not answered.]

I am looking forward to [Child]'s progress this year and appreciate the team's partnership. Please confirm receipt of this email.

Sincerely, [Your name] · [Phone / Email] · Parent/Guardian of [Child's name]

**DRAFT MY EMAIL HERE, FROM MY MEETING NOTES (TEMPLATE 4C)****WHY THIS EMAIL MATTERS**

- It creates a written record of verbal agreements that are not otherwise documented
- It starts a clock — if the school disagrees with your summary and says nothing, it becomes the accepted record
- It demonstrates that you are an engaged, informed parent, which changes meeting dynamics
- It is admissible in any state complaint or due process proceeding

**Never delete these.** Always send from an email account you will still have access to years from now. These messages are your advocacy record.

## GUIDE 4F

## Parent advocate vs. special education attorney

You have the right to bring anyone with knowledge or special expertise about your child to any IEP meeting. This guide helps you decide who to bring, and when.

| PARENT ADVOCATE                                                        | SPECIAL EDUCATION ATTORNEY                                              |
|------------------------------------------------------------------------|-------------------------------------------------------------------------|
| Not a lawyer; does not provide legal representation                    | Licensed attorney with special education law expertise                  |
| Trained in IDEA, the special education process, and IEP advocacy       | Can represent you in due process hearings and civil litigation          |
| Usually lower cost; some work on a sliding scale or through nonprofits | Higher cost, typically hourly; some work on contingency for due process |
| Excellent for navigating the process and informal advocacy             | Changes the dynamic significantly; signals you are serious              |
| Cannot represent you in due process or court                           | May recover attorney's fees if you prevail in due process               |

### BRING A PARENT ADVOCATE WHEN...

- You are new to the IEP process and feel overwhelmed or outnumbered
- You want a second set of informed ears — someone who can catch what you might miss
- You are having difficulty getting appropriate services but are not yet in formal dispute
- You want someone who knows your local district, the personalities, and the patterns
- The meeting dynamic is difficult and you want help maintaining focus and professionalism
- You need help reviewing the IEP document and identifying concerns before the meeting
- You want help communicating your concerns clearly and professionally

### BRING AN ATTORNEY WHEN...

- You are in active dispute with significant services, placement, or evaluation at stake
- You have filed, or are considering filing, a state complaint or due process hearing
- The school district has an attorney present at the IEP meeting
- Serious IDEA violations have occurred and informal resolution has failed
- A major placement decision is being forced — such as a move to a significantly more restrictive setting — and you disagree
- Your child's safety or wellbeing is at risk and the school is not acting
- The stakes are high enough — in services, years of impact, or legal consequences — to justify representation

## HOW TO FIND ONE

| RESOURCE                                                | HOW TO USE IT                                                                                                                                                                     |
|---------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>COPAA — <a href="http://copaa.org">copaa.org</a></b> | National directory of special education attorneys AND trained advocates. Search by state. Best starting point.                                                                    |
| <b>Parent Training &amp; Information Center</b>         | <a href="http://parentcenterhub.org">parentcenterhub.org</a> . Find your state's PTI. PTIs often connect you to local advocates or provide advocacy support directly, often free. |
| <b>Protection &amp; Advocacy organization</b>           | <a href="http://ndrn.org">ndrn.org</a> . Find your state's P&A. P&As provide free legal assistance to people with disabilities, including IEP advocacy and due process.           |
| <b>State bar association</b>                            | Your state bar may have a lawyer referral service with special education attorneys. Some offer free initial consultations.                                                        |
| <b>Other IEP parents</b>                                | Parent groups and disability organizations in your area often know who the effective local advocates are.                                                                         |

## NOTIFYING THE SCHOOL

You are required to give the school reasonable notice that you plan to bring an advocate or attorney. You do NOT need their permission, only their awareness.

*"I am writing to inform you that I plan to bring [Name], a parent advocate / special education attorney, to [Child's name]'s IEP meeting on [date]. They will be attending to support me in my role as a team member. Please let me know if you have any questions."*

**If the school objects.** Ask them to state their objection in writing and cite the specific IDEA provision they believe applies. There is no valid basis for excluding a person you have invited.

## GUIDE 5B

## How to write an effective escalation letter

Most disputes are resolved before reaching formal proceedings. This guide helps you write letters that document your concerns, establish a paper trail, and prompt the school to act — without burning bridges unnecessarily.

### THE FOUR-PART FRAMEWORK

| # | SECTION       | WHAT TO INCLUDE                                                                               |
|---|---------------|-----------------------------------------------------------------------------------------------|
| 1 | The issue     | State specifically what is happening or not happening. Cite the IEP. Use dates and facts.     |
| 2 | The right     | Reference IDEA or the IEP directly: “The IEP requires X,” or “Under IDEA, the school must...” |
| 3 | The request   | State specifically what you are asking for. Be concrete. Give a deadline.                     |
| 4 | The next step | State what you will do if you do not receive a response. Keep it factual and professional.    |



## SAMPLE LETTER — SERVICES NOT IMPLEMENTED

[Your name] · [Date] · [Case manager name] · [School name]

**Re: Failure to implement IEP services — [Child's name]**

Dear [Name]:

I am writing to document a concern regarding the implementation of my child [Child's name]'s current IEP, effective [date].

**The issue**

According to [Child]'s IEP, they are entitled to [X minutes] of [service type] per week, delivered in [setting] by [provider type]. Based on my records and [Child]'s reports, this service has not been delivered as written during the weeks of [dates]. Specifically: [describe what was missed, reduced, or substituted].

**The right**

Under IDEA, a school district is legally required to implement the IEP as written. Failure to deliver services as specified constitutes a denial of FAPE and may be a procedural violation of IDEA.

**The request**

I am requesting: (1) a written explanation of why services were not provided as specified; (2) a service log for the past [X] weeks documenting [Child]'s actual service minutes; and (3) a written plan to make up missed services and ensure compliance going forward. Please respond by [date, typically 5 to 10 business days].

**The next step**

If I do not receive a response by [date], I will be requesting Prior Written Notice and may file a state complaint with the [state] Department of Education.

I am committed to working collaboratively with the team to resolve this. I look forward to your prompt response.

Sincerely, [Your name] · [Email / Phone]

DRAFT MY FOUR PARTS

The issue

The right

The request

The next step

tone guidance

| do                                           | avoid                                                |
|----------------------------------------------|------------------------------------------------------|
| Be specific — cite the IEP, dates, and names | Vague complaints without documentation               |
| Be firm and factual                          | Emotional language or personal attacks               |
| Give a reasonable response deadline          | Ultimatums with unrealistic timelines                |
| State what you will do next, professionally  | Threats you have not thought through                 |
| Send by email with a read receipt            | Only calling — verbal communication leaves no record |
| Keep a dated copy with your records          | Trusting verbal assurances without written follow-up |

## GUIDE 5C

## State complaint filing guide

A state complaint is one of the most powerful and underused tools available to parents under IDEA. It is free, investigated within 60 days, and can result in mandatory corrective action — without an attorney.

**What a state complaint is.** A written allegation filed with your State Education Agency claiming that a school district has violated a requirement of IDEA. The state, not the district, investigates and rules. If a violation is found, the state must order corrective action.

### WHAT YOU CAN FILE ABOUT

- Failure to implement any part of the IEP as written — missed services, wrong setting, wrong provider
- Denial of FAPE — the IEP does not constitute an appropriate education under IDEA
- Failure to conduct an initial evaluation or reevaluation within required timelines
- Failure to provide Prior Written Notice for a significant decision
- Failure to obtain proper parental consent before evaluating or changing placement
- Failure to hold an annual IEP review within 12 months
- Required IEP team members absent from the meeting without parent agreement
- Failure to provide access to education records within 45 days
- Failure to consider an IEE report at the IEP meeting
- Failure to provide transition services as required for students age 16 and older
- Failure to provide Extended School Year services when determined necessary
- Disciplinary actions that violate IDEA — removal beyond 10 days without proper procedures

**The filing window.** You must file within one year of the date you knew or should have known about the alleged violation. Check your state's specific timeline — some differ.

## THE FILING PROCESS

| # | STEP                   | WHAT TO DO                                                                                                                                                                       |
|---|------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 | Find your state's form | Search "[your state] Department of Education IDEA state complaint." Every state has its own form and procedures. Download and read the instructions before writing.              |
| 2 | Gather documentation   | IEPs, Prior Written Notices, service logs, progress reports, correspondence, meeting notes, evaluations. The stronger your documentation, the stronger your complaint.           |
| 3 | Write the complaint    | Use Template 5D. For each allegation: state the IDEA provision violated, describe exactly what happened, include dates, attach supporting documents.                             |
| 4 | Submit                 | Send directly to your State Education Agency's special education complaints office. Most states accept email. Keep a dated copy and proof of submission.                         |
| 5 | The investigation      | The state notifies the district, which submits a written response. The investigator may contact you for more information. Cooperate fully and promptly.                          |
| 6 | The decision           | The state issues a written decision within 60 days. If a violation is found, it orders corrective action — make-up services, an IEP revision, staff training, or other remedies. |

## FINDING YOUR STATE'S COMPLAINT OFFICE

| IF YOU...                 | THEN...                                                                                                                                                                                 |
|---------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Are starting from scratch | Go to your state department of education website, search "special education," and look for "dispute resolution," "state complaints," or "procedural safeguards."                        |
| Prefer to search          | Search "[STATE] state complaint IDEA special education." Most states have a dedicated page with forms and instructions.                                                                 |
| Cannot find it            | Call your State Education Agency's main special education office and ask: "Who do I contact to file a state complaint under IDEA?"                                                      |
| Want free help            | Your state's Parent Training & Information Center at <a href="http://parentcenterhub.org">parentcenterhub.org</a> can help you locate the form and review your complaint before filing. |

## WHAT HAPPENS AFTER A FINDING OF VIOLATION

- The state orders the district to take specific corrective action within a set timeline
- Common remedies: make-up services, revise the IEP, train staff, conduct a new evaluation, change placement
- The state monitors whether the district completes the corrective action
- If the district does not comply, the state may withhold federal IDEA funding
- Filing a state complaint does not prevent you from also filing for due process, but the same issues cannot be pursued in both at once

## TIPS FROM EXPERIENCED ADVOCATES

|                                        |                                                                                                                                                                                                                                                |
|----------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Be specific, not general</b>        | Vague complaints (“the school is not helping my child”) are much harder to investigate than specific ones (“The IEP requires 60 minutes of speech therapy per week. Service logs show only 30 minutes were provided in October and November.”) |
| <b>One issue per allegation</b>        | Structure the complaint clearly, one paragraph per alleged violation. Investigators work through each allegation separately.                                                                                                                   |
| <b>Attach everything</b>               | Do not summarize documents — attach them. The IEP page that says 60 minutes, and the service log that shows 30. Let the evidence speak.                                                                                                        |
| <b>Filing often prompts resolution</b> | Many districts respond to a filed complaint by resolving the issue directly with you before the 60-day deadline. That is your leverage. Keep communication in writing.                                                                         |

## TEMPLATE 5D

# State complaint filing worksheet

Every state has its own official form and may require you to use it. Use this worksheet to prepare your content before transferring it. Search “[your state] Department of Education special education state complaint form.”

## COMPLAINANT INFORMATION

Your name

Relationship to student

Address

Email

Phone

Date of complaint

## STUDENT INFORMATION

Student's full name

Date of birth

School

District

Grade

Disability category

## THE ALLEGED VIOLATIONS

Describe each violation clearly and separately. For each one: the IDEA provision violated (cite the regulation if you can, e.g. 34 C.F.R. § 300.323), what happened or failed to happen, when, and who was responsible.

### ALLEGATION 1

IDEA provision

What happened

Date(s)

**ALLEGATION 2**

IDEA provision \_\_\_\_\_

What happened \_\_\_\_\_

Date(s) \_\_\_\_\_

**ALLEGATION 3**

IDEA provision \_\_\_\_\_

What happened \_\_\_\_\_

Date(s) \_\_\_\_\_

**SUPPORTING DOCUMENTATION TO ATTACH**

- ☐ Current IEP, all pages
- ☐ Prior Written Notices relevant to this complaint
- ☐ Service logs or attendance records
- ☐ Progress reports, or documentation that they were not provided
- ☐ Written correspondence with the school — emails and letters
- ☐ Your IEP meeting notes
- ☐ Any evaluations or reports relevant to the violation

**PROPOSED RESOLUTION**

What are you asking the state to require the district to do? Be specific. E.g. provide make-up services for the weeks of missed speech therapy; conduct a full reevaluation in all areas of suspected disability within 60 days; convene a new IEP meeting with all required team members present.

**Most complaints settle early.** Filing is often enough to prompt the district to correct the problem. Document everything — the state investigator may contact you for more information.



## RESOURCE 5E

## National and state legal help directory

Free and low-cost special education help exists in every state. This directory lists the organizations most likely to help, organized by the kind of support you need.

### START HERE — FREE, IN EVERY STATE

| ORGANIZATION                                     | WEBSITE                                                      | WHAT THEY PROVIDE                                                                                                                                             |
|--------------------------------------------------|--------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Parent Training &amp; Information Centers</b> | <a href="http://parentcenterhub.org">parentcenterhub.org</a> | Free training, information, and one-to-one support for parents of children with disabilities. Every state has at least one. This is your first call.          |
| <b>Protection &amp; Advocacy organizations</b>   | <a href="http://ndrn.org">ndrn.org</a>                       | Free legal advocacy and, in some cases, legal representation for people with disabilities. Every state has one. Can assist with IEP advocacy and due process. |
| <b>COPAA</b>                                     | <a href="http://copaa.org">copaa.org</a>                     | National directory of special education attorneys AND trained advocates. Search by state.                                                                     |
| <b>Wrightslaw</b>                                | <a href="http://wrightslaw.com">wrightslaw.com</a>           | Comprehensive free legal resource — IDEA law, case summaries, state-by-state information, and a directory of advocates and attorneys.                         |
| <b>Understood.org</b>                            | <a href="http://understood.org">understood.org</a>           | Practical resources for families of children with learning differences — IEP guides, legal explainers, and a parent community.                                |
| <b>DREDF</b>                                     | <a href="http://dredf.org">dredf.org</a>                     | National disability rights legal center — training, advocacy, and legal expertise on disability rights law.                                                   |

## FILL IN YOUR STATE'S CONTACTS

| ORGANIZATION TYPE                         | NAME IN MY STATE | CONTACT / WEBSITE |
|-------------------------------------------|------------------|-------------------|
| Parent Training & Information Center      |                  |                   |
| Protection & Advocacy organization        |                  |                   |
| State special education complaints office |                  |                   |
| State bar lawyer referral (special ed)    |                  |                   |
| Local parent advocacy group               |                  |                   |
| Disability-specific organization          |                  |                   |
| Local legal aid organization              |                  |                   |
| University special education law clinic   |                  |                   |

## WHO TO CALL, AND WHEN

| YOUR SITUATION                                                     | WHO TO CALL FIRST                                                                                     |
|--------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------|
| I am new to the IEP process and do not know where to start         | Parent Training & Information Center — free training, guidance, and one-to-one support                |
| I have concerns about the IEP and want a second opinion            | Your PTI, or a parent advocate found through COPAA                                                    |
| The school is not implementing the IEP — services are being missed | PTI for guidance; file a state complaint; contact your P&A for legal help                             |
| I want to request an Independent Educational Evaluation            | PTI can help you write the letter; P&A if the school refuses and you need legal help                  |
| I am considering filing a state complaint                          | PTI to review your complaint before filing; P&A if you need legal assistance                          |
| I am in active dispute and considering due process                 | A special education attorney through COPAA or your state bar; P&A for free representation if eligible |
| The school has an attorney at the IEP meeting                      | Contact a special education attorney immediately. This changes the dynamic significantly              |
| I cannot afford an attorney but need representation                | Your state's P&A. They provide free legal services to eligible individuals with disabilities          |

## DISABILITY-SPECIFIC NATIONAL ORGANIZATIONS

| ORGANIZATION                       | WEBSITE                                                        | FOCUS                                                                    |
|------------------------------------|----------------------------------------------------------------|--------------------------------------------------------------------------|
| Autism Society of America          | <a href="http://autism-society.org">autism-society.org</a>     | Autism — local chapters in most states with advocacy support             |
| Autism Self Advocacy Network       | <a href="http://autisticadvocacy.org">autisticadvocacy.org</a> | Autism — self-advocacy and rights                                        |
| International Dyslexia Association | <a href="http://dyslexiaida.org">dyslexiaida.org</a>           | Dyslexia and reading disabilities — state branches, school literacy laws |
| Learning Disabilities Association  | <a href="http://ldaamerica.org">ldaamerica.org</a>             | All learning disabilities — state chapters, parent resources             |
| CHADD                              | <a href="http://chadd.org">chadd.org</a>                       | ADHD — IEP and 504 guidance, local support groups                        |
| National Down Syndrome Society     | <a href="http://ndss.org">ndss.org</a>                         | Down syndrome — legal resources, IEP advocacy, inclusion support         |
| National Federation of the Blind   | <a href="http://nfb.org">nfb.org</a>                           | Visual impairment — legal advocacy, education resources                  |
| National Association of the Deaf   | <a href="http://nad.org">nad.org</a>                           | Deafness and hearing impairment — legal and education advocacy           |
| Federation of Families             | <a href="http://ffcmh.org">ffcmh.org</a>                       | Children’s mental health                                                 |
| United Cerebral Palsy              | <a href="http://ucp.org">ucp.org</a>                           | Cerebral palsy and related disabilities                                  |

**Local chapters know your district.** Many of these organizations have state or local chapters that know your district’s specific patterns and personalities. A parent in your local chapter who has navigated your district is an invaluable resource.

## CHECKLIST 6B

## School transition preparation checklist

Every major school transition is a high-risk window for your child's IEP. Services can be reduced, relationships change, and new teams may not know your child. Prepare six months in advance.

### PART A — EARLY INTERVENTION TO SCHOOL SERVICES, AGE 3

- ☐ Request a transition planning meeting with your early intervention coordinator at least 6 months before your child's third birthday
- ☐ Obtain all current early intervention evaluation reports before the transition conference
- ☐ Request that the school district conduct its own evaluation — do not assume EI data is sufficient
- ☐ Confirm the district has received your child's early intervention records
- ☐ Attend the transition IEP meeting — you are a required member of the team
- ☐ Confirm services are in place and will begin ON your child's third birthday, with no gap
- ☐ Get all agreed services in writing before the IEP meeting ends
- ☐ After starting school, check in at 3 weeks and 6 weeks — new environments are high risk

### PART B — ELEMENTARY TO MIDDLE SCHOOL

- ☐ Request a transition IEP meeting 6 months before the move
- ☐ Visit the middle school — tour the special education facilities and meet the team if possible
- ☐ Request that the new case manager attend the final elementary IEP meeting
- ☐ Ask explicitly: will services continue without interruption from Day 1 at the new school?
- ☐ Confirm the full IEP — goals, services, accommodations — transfers and will be implemented
- ☐ Discuss how your child will receive accommodations across multiple teachers
- ☐ Ask about the transition supports the school provides — advisory programs, peer mentoring
- ☐ Send an introduction email to the new case manager before school starts
- ☐ First 6 weeks: weekly check-ins with your child, every two weeks contact with the case manager
- ☐ Request a 6-week progress check with the team — schedule it before school starts

### PART C — MIDDLE TO HIGH SCHOOL

- ☐ Start transition IEP planning 6 months before the move
- ☐ Confirm a transition plan will be included if your child is 16 by the IEP date (14 in some states)

- ☐ Discuss course selection and diploma-track implications — modifications vs. accommodations
- ☐ Ask about graduation requirements and how the IEP supports meeting them
- ☐ Ensure your child has a voice in their IEP and transition plan — invite them to participate
- ☐ Ask about dual enrollment, vocational programs, and postsecondary preparation
- ☐ Discuss the self-advocacy skills your child will need — accommodations in college are much harder to get
- ☐ Request information about how accommodations are documented for college, SAT, and ACT
- ☐ First 6 weeks: establish contact with the new case manager immediately

#### PART D — HIGH SCHOOL TO POSTSECONDARY, AGES 18 TO 21

- ☐ The IEP must include measurable postsecondary goals: education or training, employment, independent living
- ☐ Transition services must be specific — not “explore careers,” but actual activities and supports
- ☐ Invite your student to lead portions of the IEP meeting. They need this skill for adulthood
- ☐ Research adult services: Vocational Rehabilitation, adult disability supports, Social Security
- ☐ Understand the age-of-majority transfer of rights in your state, typically at 18
- ☐ If rights transfer: discuss whether guardianship, supported decision-making, or power of attorney is appropriate
- ☐ Research disability services at any colleges or trade schools your child is considering
- ☐ Make sure graduation documentation is accurate — a diploma versus a certificate of completion has major implications

#### AFTER ANY TRANSITION — THE CRITICAL FIRST SIX WEEKS

**Services start on the first day.** If a service does not begin on the first day at the new school, contact the case manager in writing that week.

- ☐ Confirm your child’s accommodations are in place with every teacher
- ☐ Check in with your child weekly. Ask specific questions, not just “how was school?”
- ☐ Request a 6-week meeting if you have any concerns — you have this right
- ☐ Document any problems immediately — by email, not just by phone

## GUIDE 6C

## Secondary transition planning

Transition planning is one of the most consequential parts of the IEP, and one of the most neglected. It determines what your child's life after school looks like. Starting no later than age 16 — age 14 in some states — IDEA requires specific transition components in every IEP.

### WHAT IDEA REQUIRES — THE FIRM REQUIREMENTS

- Measurable postsecondary goals in education or training — what the student plans to do after high school
- Measurable postsecondary goals in employment — a specific career or job area, not just “get a job”
- Measurable postsecondary goals in independent living where appropriate — housing, finances, daily life
- Transition services designed to reach those goals — courses, job shadowing, community experiences, skills training
- Age-appropriate transition assessments — interests, strengths, and preferences formally assessed and documented
- Annual IEP goals that build the skills needed to reach the postsecondary goals
- A course of study — the specific classes and program the student will follow to reach graduation
- The student invited to the IEP meeting — required when transition is on the agenda
- Agency representatives invited where appropriate — vocational rehabilitation, adult services, community providers

#### THE STUDENT MUST DRIVE THE PLAN

- The plan must be based on the individual student's strengths, preferences, and interests — not on what programs are available or convenient for the school
- The student should be asked directly: what do you want to do after high school? What kind of work interests you? Where do you want to live?
- Formal transition assessments must document these preferences, not just teacher impressions
- The IEP should reflect what YOUR child wants, not a generic postsecondary track
- If the school proposes a plan without genuinely asking the student, push back

#### RED FLAGS — THIS PLAN NEEDS REVISION

- Postsecondary goals are vague: “will work in the community” or “will attend some form of postsecondary education”
- No formal transition assessment has been conducted — preferences are based on staff impressions only
- The student was not invited to the IEP meeting
- Transition services are not specific — “will explore career options” rather than “will complete two job shadows in healthcare settings”
- Independent living goals are missing for a student who will need daily living supports
- The plan is identical to what every student with this disability gets — not individualized
- No agency partners have been involved or invited for a student approaching age 18

## QUESTIONS TO ASK AT EVERY TRANSITION IEP

- Has a formal age-appropriate transition assessment been conducted? Can I see the results?
- Were my child's own preferences and interests the starting point for these goals?
- What specific transition services are written into this IEP — not aspirations, but actual activities?
- Does the course of study align with the postsecondary goals?
- Has Vocational Rehabilitation been contacted or invited? (Critical at age 15 to 16.)
- What adult services might my child need, and when should we start applying?
- What diploma will my child receive, and have we been clear about the implications?
- Is my child building the self-advocacy skills they will need when they leave this school?

## THE AGE OF MAJORITY — TRANSFER OF RIGHTS

- In most states, IDEA rights transfer from parents to the student at age 18. The student, not the parent, becomes the legally recognized decision maker for IEP purposes. This must be disclosed in the IEP at least one year before the transfer.
- The IEP must include a statement that the student has been informed of the rights that will transfer
- Some families pursue guardianship, conservatorship, or supported decision-making agreements — consult an attorney
- Even without guardianship, parents can participate if the student invites them
- Your state's Protection & Advocacy organization can advise on options — see Resource 5E

## KEY TRANSITION PARTNERS

| PARTNER                                       | WHAT THEY DO, AND WHEN TO INVOLVE THEM                                                                                                        |
|-----------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Vocational Rehabilitation</b>              | State agency providing job training, supported employment, and career services. APPLY EARLY — waitlists can be long. Involve at age 14 to 16. |
| <b>Social Security Administration</b>         | SSI and SSDI eligibility; benefits counseling. Review eligibility before age 18 — rules change at adulthood.                                  |
| <b>Adult disability services (state)</b>      | Medicaid waiver programs, supported living, day programs. Waitlists can be years long — apply as early as your state allows.                  |
| <b>Community colleges / technical schools</b> | Disability services offices; dual enrollment during high school; vocational certificates.                                                     |
| <b>Independent living centers</b>             | ilru.org — peer-supported services including skills training, housing support, and advocacy.                                                  |

## WORKSHEET 6D

## My child's self-advocacy goals

Self-advocacy is not a high school skill. It is built over years, starting in early childhood. Use this sheet to set intentional goals at each stage.

### ABOUT MY CHILD

Child's name

Current age / grade

Disability category(ies)

Current self-advocacy strengths

Current self-advocacy challenges



**ELEMENTARY, AGES 5 TO 10 — AWARENESS AND NAMING**

Goal for this stage: my child can name their disability simply, identify what helps them learn, and ask for help.

| SKILL TO BUILD                                          | HOW WE WILL PRACTICE / TARGET DATE |
|---------------------------------------------------------|------------------------------------|
| Can name their disability in simple terms               |                                    |
| Can say what helps them learn or focus                  |                                    |
| Can ask a trusted adult for help                        |                                    |
| Can name at least three personal strengths              |                                    |
| Knows the name of their case manager or support teacher |                                    |
| Other                                                   |                                    |

**MIDDLE SCHOOL, AGES 11 TO 13 — UNDERSTANDING AND PARTICIPATING**

Goal for this stage: my child understands their IEP basics, can describe their accommodations, and begins attending IEP meetings.

| SKILL TO BUILD                                        | HOW WE WILL PRACTICE / TARGET DATE |
|-------------------------------------------------------|------------------------------------|
| Can explain their disability in age-appropriate terms |                                    |
| Knows what their accommodations are and why they help |                                    |
| Can name their IEP goals in their own words           |                                    |
| Has attended at least one IEP meeting, even briefly   |                                    |
| Can ask a teacher to implement an accommodation       |                                    |
| Knows their rights to disability support at school    |                                    |

## HIGH SCHOOL, AGES 14 TO 17 — LEADERSHIP AND INDEPENDENCE

Goal for this stage: my child can lead portions of their own IEP meeting, explain their disability to new teachers, and request accommodations independently.

| SKILL TO BUILD                                                            | HOW WE WILL PRACTICE / TARGET DATE |
|---------------------------------------------------------------------------|------------------------------------|
| Leads their portion of the IEP meeting — goals, strengths, needs          |                                    |
| Can explain their disability professionally to a new teacher              |                                    |
| Requests accommodations independently at the start of each class          |                                    |
| Understands what disability services look like in college vs. high school |                                    |
| Has practiced requesting accommodations from an adult they do not know    |                                    |
| Knows their rights at the age-of-majority transfer                        |                                    |

### FAMILY PRACTICE IDEAS

- Review the IEP together: “Does this feel right? Is there anything missing about you?”
- Role-play how to tell a new teacher about accommodations
- Have your child attend the last 15 minutes of every IEP meeting — build comfort gradually
- Ask: “What do you wish your teachers understood about how you learn?”
- Celebrate advocacy moments — when they asked for help, when they explained a need

**Why this matters.** The goal of self-advocacy is not to replace your support. It is to make sure your child can speak for themselves in the rooms you will not always be in.

## RESOURCE 6E

## Your advocacy village

Use this sheet to build your support network: national organizations you can contact today, and a personal directory you fill in for your local contacts.

### TIER 1 — YOUR FIRST CALLS, FREE, IN EVERY STATE

| ORGANIZATION                         | FIND IT AT                                                   | WHAT YOU GET                                                                                                                             |
|--------------------------------------|--------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------|
| Parent Training & Information Center | <a href="http://parentcenterhub.org">parentcenterhub.org</a> | Free one-to-one support from trained parent advocates, meeting preparation, legal information, workshops, and community — in every state |
| Protection & Advocacy organization   | <a href="http://ndrn.org">ndrn.org</a>                       | Free legal advocacy and representation for people with disabilities — IEP disputes, due process support, rights education                |
| State special education office       | Your state dept. of education                                | File state complaints, access state-specific IDEA information, obtain your Procedural Safeguards Notice                                  |

### TIER 2 — LEGAL AND ADVOCACY REFERRAL

| ORGANIZATION                              | FIND IT AT                                         | WHAT YOU GET                                                                                        |
|-------------------------------------------|----------------------------------------------------|-----------------------------------------------------------------------------------------------------|
| COPAA                                     | <a href="http://copaa.org">copaa.org</a>           | National directory of special education attorneys and advocates. Search by state and specialty      |
| Wrightslaw                                | <a href="http://wrightslaw.com">wrightslaw.com</a> | Free IDEA legal resources, case summaries, state-by-state information, and a directory of advocates |
| DREDF                                     | <a href="http://dredf.org">dredf.org</a>           | Disability rights legal center — training, policy advocacy, technical assistance                    |
| National Center for Learning Disabilities | <a href="http://ncld.org">ncld.org</a>             | Policy advocacy, research, and resources for learning disabilities                                  |

BUILD YOUR LOCAL NETWORK

Fill this in as you connect with people in your community. Your local network is often more powerful than national resources.

| NAME / ORGANIZATION | HOW THEY CAN HELP | CONTACT | NOTES |
|---------------------|-------------------|---------|-------|
|                     |                   |         |       |
|                     |                   |         |       |
|                     |                   |         |       |
|                     |                   |         |       |
|                     |                   |         |       |
|                     |                   |         |       |

HOW TO BUILD IT

|                                                           |                                                                                                                                                                                                                                                            |
|-----------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Connect with other IEP parents in your district           | Parent groups, disability-specific groups, and your school’s PTA can connect you with families who know your district. Ask who the effective case managers are, which schools have strong inclusion programs, and who helped them through a difficult IEP. |
| Attend school board meetings                              | When special education is on the agenda, show up. You will meet other families and learn who the key decision makers are. Introduce yourself to the director of special education.                                                                         |
| Contact your PTI and ask about parent groups              | Your state’s Parent Training & Information Center often knows the strongest parent advocates and community networks in your area, and may host events where you can meet others.                                                                           |
| Find your district’s special education advisory committee | Most districts have an advisory committee that includes parents. Attending or joining gives you insight into districtwide policy and connects you with other informed families.                                                                            |

**Remember.** You are not the first parent to advocate in your district. The parents who came before you know things that took years to learn. Find them.

## ONE MORE THING

## Before you begin

These sheets are here to help you put what you know about your child into writing, and to help you ask the school to respond in writing.

### FIVE PRACTICES

- 1 **Put it in writing.** After every call and every meeting, send a short email summarizing what was said. Silence becomes agreement.
- 2 **File it the day it arrives.** Use your IEP Master Binder. A document you cannot find is a document you do not have.
- 3 **Ask for the data.** “What data supports that statement?” is the most useful sentence in any IEP meeting.
- 4 **Ask for Prior Written Notice when the answer is no.** It turns a verbal refusal into a document you can act on.
- 5 **Do not sign at the table.** Take the IEP home. Read it. Sign it when you are ready.

### IF YOU NEED HELP

| WHAT YOU NEED                             | WHERE TO START                                                                                                   |
|-------------------------------------------|------------------------------------------------------------------------------------------------------------------|
| Free one-to-one parent support            | Your state's Parent Training & Information Center — <a href="http://parentcenterhub.org">parentcenterhub.org</a> |
| Free legal advocacy                       | Your state's Protection & Advocacy organization — <a href="http://ndrn.org">ndrn.org</a>                         |
| An advocate or attorney                   | COPAA — <a href="http://copaa.org">copaa.org</a>                                                                 |
| IEP document review and advocacy coaching | EDquity at the Margins — <a href="http://edquityatthemargins.org">edquityatthemargins.org</a>                    |

#### EDQUITY AT THE MARGINS

### Securing what children are already owed.

Parent education, not legal advice · [edquityatthemargins.org](http://edquityatthemargins.org)

